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ABSTRACT

The questions of what and how working people learn about labor organization and activity in Canada were explored through a review of available literature and face-to-face interviews with more than 30 education officers and union leaders. Unions continue to be the principal source of labor education. Of the many courses and educational experiences that unions offer their membership, steward-training courses tend to be the best developed and documented. However, steward-training courses constitute only a small portion of the labor education that is currently being made available to trade union members and staff. Many unions are offering a sophisticated and integrated educational experience that is allowing union members to learn a variety of skills and knowledge that could be recognized by the formal education system. Special events and schools range from modest 1-day affairs to week-long functions. The measure of the various courses/programs is their success in preparing union members and activists to deal with the concrete demands they face in the workplace, their union, and their community. Some unions insist that labor education be provided primarily by rank-and-file members, others deliver courses through an educational officer, and yet others have "specialists" deliver courses. (A description of the Learning Labour project is appended.) (MN)

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NALL Working Paper #07-1999

Learning About Labour in Canada

Winston Gereluk, Derek Briton and Bruce Spencer
Athabasca University

This working paper explores what and how working people learn about labour organization and activity in Canada. Much of the organized learning in labour unions (union education courses) can be categorised in adult education terms as "non-formal adult education." In addition union members learn through their union activity in labour organizations and campaigns, what would be categorised as "informal learning."

Since the appearance of the Educating Union Canada article in the Canadian Journal for the Study of Adult Education 1994 there has been a renewed interest and understanding of labour education as an important segment of adult education in Canada. With more than 120,000 participants per year engaging in forms of labour education it is probably Canada's most prolific form of non-formal, non-vocational adult education (Spencer, 1994, 1998a). Friesen (1994) has reflected on its historical significance as a contributor (or otherwise) to developing working class culture. D'Arcy Martin (1995, 1998) has provided some insights into teaching objectives and the adoption of popular education methods in labour classrooms -- illustrating the labour movement's contemporary contributions to sustaining workers' culture. Taylor (1996) has discussed the impact of on-line learning on labour education and the CASAE/ACCEA edited collection Learning for Life: Canadian Readings in Adult Education (Scott et. al., 1998) has speculated on the new directions labour education may go in the twenty-first century (Spencer, 1998b). There are other studies from OJSE linking education for work with labour education (both non-formal and informal) and union activism at a local level (Sawchuk, 1997; Livingstone and Roth, 1997). These studies, and others not listed here, are not always connected but they do add up to a resurgence of labour education scholarship.

The problems of defining and describing labour education were discussed in the 1994 article they will not be revisited here. For our purposes it is enough to grasp that labour education includes all union and independently provided education designed to strengthen union representation, activity and culture. It is not to be confused with "workplace learning" which is essentially aimed at making workers better (and more compliant?) human resources. In this article we will be concentrating on union-provided education and will focus on aspects of labour education that have become more visible as a result of our ongoing research into prior learning assessment and recognition (PLAR) of labour education (see appendix). We will discuss: steward training within the context of overall provision; special events and schools; literature and readings; who takes part in and who delivers labour education; objectives and criteria of success.

To date a wide range of materials and responses has been collected from a large number and variety of sources. These include trade unions, union locals, employee associations, labour centrals and other organizations, agencies and consortia. They also include a number of business and educational institutions that deliver basic labour education to unions and union members. A "file" has been created in each case, and almost fifty such files have already been summarised in a spreadsheet, which will form an integral part of the final Report of the Learning Labour: A PLAR Project.

Steward Training as "Core" Labour Education

A major objective of the field research conducted by Winston Gereluk from 1997 to 1998 has been to gather material necessary to provide an overview of the content, nature and extent of labour education in Canada today. Towards this end, we have begun to summarise a number of the course and program packages, event brochures, materials, and other data gathered from a number of individual unions and organizations that have come to us in various stages of development and articulation. In over 30 cases, these materials have been matched with face-to-face interviews with education officers and union leaders.

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After examining the material packages collected to date, it is evident that, of the many courses and educational experiences that unions offer their membership, steward-training courses tend to be the most well developed and documented. It is also clear that, while these steward-training courses may be similar in many respects, they also differ in important ways. This is largely because steward-training courses tend to be developed with particular needs and organizational priorities in mind. For instance, many are structured around the specific collective agreements, other agreements, and legal frameworks under which shop stewards are expected to function. An examination of course content revealed a certain number of common themes, of which the following items from the International Woodworkers, Canadian Division is typical:

I.W.A. Canada Steward Training

Steward Training — Level I

Why Unions?
Labour's Structure
Anti-Union/Anti-Worker Myths
The Steward's Role
The Tools to do the Job
What's a Grievance?
Types of Grievances
Investigating the Grievance
Handling Grievances
Presenting the Grievance
Writing the Grievance
Issues to Consider

Steward Training — Level II

Investigating the Grievance
Checklist for Grievance Investigation
Contract Interpretation
Handling Disciplinary Action
What if the Grievor Won't Sign the Grievance?
Handling Grievances
Presenting the Grievance
Each Grievance Stands on It's Own Merits
A Steward's Checklist for Dealing with Supervisors
When to Bring a Grievor into a Grievance Meeting
Management's Reply
What to Remember When Talking to Union Members

Steward courses describe only a small portion of the labour education which is made available today to members and staff of trade unions, however. Many of the other courses and experiences which unions typically configure into their total pattern or program can be seen in the following schedule. Some of the more typical courses are combined, in this case, with other courses that reflect the mission, priorities or tendencies of a particular union:

B.C. Government & Service Employees' Union Courses

Leadership
Basic Shop Stewards
Advanced Shop Stewards
Local Officers' Training (II Modules)
Activist Training
Assertive Communication in the Workplace — Part 1
Assertive Communication in the Workplace — Part 2
Grievance Handling — Step I and Step 2
Facing Management
Role of Shop Stewards in Effective Handling of Harassment Complaints
Equality Courses: Valuing Our Diversity

Equality Courses: Employment Equity
Sexual Harassment in the Workplace
Stopping Sexual Harassment in the Workplace
Effective Workplace Communication with Persons with Disabilities
Trade Union Activists Travelling Alone
A Balancing Act (Sandwich Generation)
Without Fear (Fighting Violence Against Women)
Trade Union Women and Ageing
Union Men and Women Talking
Assistance, Education & Effectiveness Training for College Board & Education Council Members
How to Run an Effective Committee
Parliamentary Procedure & Public Speaking
Telework
Master Agreement Union and Management Joint Training Program — Steward and Manager Step 2 Designates

Depending on how fully developed and articulated the program, courses and educational activities are also often layered or graduated. The following program schedule provided by the Canadian Union of Public Employees provides an example of a fully developed program:

Canadian Union of Public Employees, Education Program

LEVEL 1
New Members/Officers

LEVEL 2
Stewards/Advanced Stewards

LEVEL 3
Collective Bargaining
Part 1 -- Introduction
Part 2 -- Preparation
Part 3 -- Research and Statistics

LEVEL 4
Specialised Courses

Part 1 -- Intensive Study
Advanced Parliamentary Procedure
Face to Face Communication
Labour Arbitration
Public Speaking/Parliamentary Procedure

Part 2 -- Role of Unions
Introduction to Economics
Labour Law
Political Action

Part 3 -- Specific Concerns
Adult Education Techniques
AIDS in the Workplace
Assertiveness Training
Asbestos in Workplace
Breaking Barriers
Contracting Out/Privatization
Introduction to Health and Safety
Basic Occupational Health and Safety (OHS)
Advanced OHS

How to Participate in the Labour Movement
Organizing Pay Equity
Retirement Planning
Strategies for Equality
Technological Change
Women in the Union
WHMIS

Part 4 -- Other Courses
Guide to Mergers
Basic Human Relations
Facing Management
Job Evaluation
Pensions/Employee Benefits
Public Relations
TQM
EI and Workers' Compensation
Union Counselling
Union Leadership
Workplace Stress

This layering affects the members who are admitted or recruited to attend the next level of union courses and union functions. It is clear that what is being offered by unions is a sophisticated and integrated educational experience for their active members.

Special Events and Schools

Our spreadsheets will also show that most unions and labour organizations round out their educational programs with a number of other events and supporting activities. Far from being considered peripheral or "add-on", these are usually intended to fulfil key objectives. While such events as "schools" and conferences are sometimes provided by individual unions, it appears to most often be the case that they tend to look to central labour bodies, labour councils, federations of labour and the Canadian Labour Congress to sponsor these. Unions in Saskatchewan, for example, depend to a great degree on the Saskatchewan Federation of Labour and the Canadian Labour Congress, Prairie Region for schools and events like the following:

Saskatchewan Federation of Labour/Canadian Labour Congress Annual Spring School
1998 Annual Spring School -- May 3-8, 1998
Echo Valley Conference Centre
Fort Qu'Appelle, Saskatchewan

Training for Tomorrow...Meeting Workers' Needs — A Saskatchewan Labour Training Conference
March 29,30&31 1998
Delta Bessborough Hotel
601 Spadina Crescent E. Saskatoon, Saskatchewan

The 2nd Annual Prairie School for Union Women
March 15-19, 1998
Echo Valley Conference Centre
Fort Qu'Appelle, Saskatchewan

These events range from modest one or two-day affairs to weeklong functions, of which the Winter School of the CLC Prairie Region provides perhaps the leading example. This School is a held annually over four weeks in January and early February, with about 12 courses offered on average during each separate week. The tradition of the School has been developed to the point that individual unions now compete for the opportunity of sponsoring some of their own courses in conjunction with it, as a way of capitalising on the opportunity for networking and union solidarity which it provides. Similar schools

are provided in other regions.

We have likewise documented numerous other events and supporting activities. For example, unions may bring their stewards and officers together for refreshers, or updates. They also hold one-day or longer conferences to discuss specific topics such as new legislation or government policy.

The most intensive and advanced labour education is the four-week (formerly eight-week) Labour College of Canada Residential Program offered annually by the Canadian Labour Congress in co-operation with the University of Ottawa. This school is regarded by many as the pinnacle of a Canadian trade unionist labour education, and students are selected on a wide range of criteria, such as prior completion of a large number of courses offered by unions or labour centrals. Union activity, experiences, and a certain level of competency are also canvassed. A close second, in terms of intensity and critical education is the autoworkers (CAW) and postal workers (CUPW) four-week residential membership education courses (for a fuller discussion of these longer courses see the 1994 article).

Literature and Readings

Unions and organizations offering labour education usually publish materials for course use as well as for the continuing use of the students after they leave the course. Firstly, those who enrol in courses typically receive a kit and a handbook: e.g., Steward Manuals or Table Officers' Handbooks, these are supplemented with periodical publications intended to further advance their training and to keep stewards, officers and activists abreast of developments. Education, or learning, is then an on-going activity for these lay representatives.

Samples of course readings and literature is being collected as a part of this study. As an example, the following are amongst the course materials provided for the Intensive Basic Leadership Program offered to leading union members of the Autoworkers' Union at the CAW Family Education Centre in Port Elgin as part of the union's Paid Educational Leave initiative:

- the Ontario Labour Relations Board Rules of Procedure;
- Bill 7: Facts and Figures, by Judith McCormack, Sack Goldblatt Mitchell;
- ICCHRLA Special Report -- One Step Forward, Three Steps Back -- Human Rights in Colombia Under the Samper Government, October 1997;
- A Life Threatening Activity" Trade Unionism Under Attack in Colombia: Report of the Canadian Trade Union Delegation to Colombia.

Who Takes Part in Labour Education?

The measure of these courses is their success in preparing members and activists to deal with the concrete demands they will face in the workplace, their union and the community. For example the proof of steward training is in demonstrated ability of stewards to handle grievance and arbitration cases, rather than some external standard of competence.

As a consequence, access to steward training courses is usually restricted to those who have met certain prerequisites; usually related to this type of work or activity. These can be formal or informal. For example, before attending a steward's training course, a union member may be required to attend other preparatory courses. Or entrance to steward training may be restricted to those who have "proven" their commitment to the union in any one of a number of ways: regular attendance of meetings, volunteer work, picket-line duty, etc.

The Public Service Alliance of Canada, for example, provides "prerequisites" for registrants in its Steward Advanced Training Program (SATP) in the following way:

A potential candidate for SATP us a steward or chief steward who:

- Has demonstrated the potential as organizer and problem-solver at the workplace by applying the basic knowledge and skills acquire on BUS, and needs to enhance that knowledge and those skills;
- Requires the competence and confidence to carry out the practical work of the local;
- Has demonstrated initiatives in making the union a more effective force in the workplace in the areas of representation, motivation, communication and organization;
- Has proven interest in and commitment to the basic premise of trade unionism, which is people helping people.

Who delivers labour education?

Just as those who attend steward-training courses must meet certain prerequisites, so must those who teach them. Again, the prerequisites are a mixture of formal and informal requirements. Instructors may have to attend certain educational programs to prepare them for teaching, or may be required to have served as a steward for a number of years. In addition, those who teach or attend steward training courses tend to be those who are acknowledged (either by union leadership or the membership) to possess the skills and desire to achieve success. Such skills include such things as "experience in the line-of-fire," "street smarts," "practical wisdom," and "political savvy." The differences among the various steward-training courses all exist for good reasons.

There appears to have been a "back to the locals" movement in the delivery of labour education during the period from the late 1970's to the early 1990's. This was largely intended to replace staff representatives who had formerly been delivering courses with "rank-and-file" instructors.

Coincidentally (and perhaps by way of explanation), these years are generally recognized as a time of retrenchment in the Canadian labour movement, as unions struggled to adapt to changing circumstances imposed by restructuring of the workplace and work process, globalization, new management techniques and unfriendly governments. Much of the rhetoric has supported a style of education delivered by members rather than paid staff, i.e., an emphasis on popular educational techniques including peer tutoring and facilitation. In Canada, the United Steelworkers have been prime exponents of this style, as the following statement from their Program Guide attests:

> All US.W.A. courses were designed to be immediately and practically useful to students. To this end each course was developed jointly by the US.WA. Education Department and local union members with knowledge and experience in the specific office or activity covered by (he course. The instructors of the courses are also local union members, chosen for their expertise and educational skills.

Whether offered by union staff or members, courses are most often taught in a participatory, "hands-on," manner to reinforce their practical application. Students are shown and made to handle the actual materials and experiences for which a course is training them. They are also presented with case studies of actual situations to improve their understanding of the "do's" and "don'ts" of a specific task. All courses are taught in a "student-centred" manner to encourage students to speak frankly, ask questions and engage in discussions. This allows students' to influence the direction and emphasis of a course.

At the same time it is clear that this movement toward peer instructors has by no means resulted in a simplistic "populist" approach to labour education; i.e., one which is member-delivered or controlled without reference to broader union goals. Today, in almost every union or labour central, education is designated the responsibility of a staff specialist or full-time officer, who is most often extensively qualified to carry out these duties by a combination of formal education and experience. As a matter of fact, these were most often the people interviewed in this Project.

The result of the two tendencies has been a variety of styles or protocols for the delivery of labour education that form a continuum described by the following examples:

- Unions such as the United Steelworkers who insist on education provided primarily by rank-and-file;
- Unions such as the Saskatchewan Government Employees Union, which deliver its courses through an educational officer, with rank-and-file members given responsibility for facilitating group discussions;
- Unions such as the Canadian Union of Public Employees, in which "specialists" deliver the majority of courses.

A few other observations may be made here: (1)There is considerable emphasis on instructor training, for staff and for rank-and-file instructors. This has already been noted in the statement from the United Steelworkers, and is evident in most large unions. (2)Even where "rank-and-file" members deliver courses, they do so under the supervision or direction of "specialists". The Public Service Alliance of Canada, for example, has a Member Instructor Program which

> ....consists of training members who are interested in acting as instructors within their locals. ... The trained members are asked to organize educational and training activities

within their locals, and set up local education committees. They are sometimes asked to use this experience during union conferences or courses offered by Regional Offices."

(3) Several unions take this a step further. For example, while the International Association of Machinists delivers first level courses at the regional level, they provide the bulk of the higher level training at a Training Centre outside the country (Placid Harbor Education & Technology Center), at which selected stewards and officers take courses such as the following:

Leadership I
Advanced Leadership
Basic Editors
Collective Bargaining
Pension
Orientation Skills
Train-the-Trainer
Leadership II
French Leadership I
French Leadership II
French Advanced Leadership
Advanced Collective Bargaining
Arbitration
Comprehensive Training Program
Strategic Planning

Objectives and Criteria of Success

For the most part, objectives for the courses and programs have been faithfully provided by the unions and centrals canvassed in this Project. What had become evident is the extent to which:

- these reflect the broader "mission" or constitutional aims of the Union, and
- the broader "affective" domain (e.g., feelings of "union solidarity") is represented in these statements.

As indicated in the section above, a prevailing theme in these statements of objectives will relate to the concrete demands stewards, officers, and other members face in the workplace, their union and the community.

While steward training tends to form the central pillar of most educational programs, what is true of it is true of most areas. However, individual union courses do not attempt or professes to produce a "steward-in-general." Care is needed therefore when measuring any of these courses against some external standard of "steward training-in-general." It may be more profitable to focus in the advanced stages of this Project on a single, exemplary steward training course -- possibly one of the more fully developed, tested, and documented -- and identify the criteria that contribute to its success. Once identified, these criteria can serve as touchstone against which other steward training courses can be compared and gauged.

This measure will not remain static, however. Whenever new criteria that contribute to the successful preparation of shop stewards are identified, they will be incorporated into the touchstone. In this manner, a set of criteria against which shop steward training courses can be measured can be induced from existing best practices, rather than deduced from external standards of educational performance, as they may be applied to steward courses.

Measuring success in achieving these objectives is another matter. The measure of these courses, the standards of competence that are applied are not always made explicit, but are nonetheless present in all cases. Written statements occur in a variety of documents and sources; e.g., constitutions, policy papers, resolutions, etc. The following statements extracted from the Education Policy of the Alberta Union of Provincial Employees illustrates the manner in which these occur:

> 3.3 Policy on Grievance Handling for Union Stewards and Union Representatives. The number of grievances being handled by the Union is steadily increasing. It is necessary that Union Stewards be involved in this process at the worksite and promote the Union position

of attempting to satisfactorily resolve complaints and grievances quickly and at the lowest level. The number of technical challenges on grievances is also increasing and therefore must be a system set up to prevent unnecessary losses.

1. Union Stewards must be elected by their component (Constitution Article 15% Only recognized Union Stewards and Union Reps may process grievances.

2. Union Stewards should be properly trained in grievance handling prior to dealing with grievances.

3. Trained Union Stewards are encouraged to handle grievances at the informal Discussion Level and the formal Levels prior to arbitration. During the processing of any grievance, the Steward shall consult regularly with his her Union Staff Representative to receive guidance. As well, the Steward shall submit copies of all grievances and related documents to the Union Staff Representative immediately as they are received.

With the recent rise of jurisdictional objections arising from grievance wording and processing, it is necessary that, prior to submitting a written grievance, the Union Steward consult with the Union Staff Representative to ensure the grievance is properly written and filed.

A search for these standards or criteria will form part of the mission of the current phase of the Learning Labour -- PLAR Project. Where they cannot be found in written form, they will be adduced through interviews and observation of specific educational experiences.

Conclusion

It is clear that labour education in Canada today prepares members and activists to better participate in union and community affairs. It is not the intention of the union movement to provide formal qualifications or vocational skills by this labour education (some unions are directly involved in vocational training, outside or alongside of the unions' labour education program). But nonetheless members are learning a variety of skills and are being introduced to knowledge that could be recognized by the formal education system. In our view labour education and the learning that is associated with union activity deserves recognition within the formal system.

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Appendix: Learning Labour: A PLAR Project

Project Team
Team Leader: Bruce Spencer, Chair, Centre for Work and Community Studies Athabasca University
Researchers: Derek Briton, Graduate Student, University of Alberta and Acting Coordinator, Labour Studies, Athabasca University.
Winston Gereluk, Officer, AUPE.
Advisers: Ken Collier, Director, Centre for Learning Accreditation, Athabasca University.
Jeff Taylor, Labour Studies Coordinator, Athabasca University (part-time sevondnient to CLC).

This is a four-year research project; it began as part of the New Approaches to Lifelong Learning (NALL) network headed up by David Livingstone OISE. This particular project is in its second full year and has received additional funding from Athabasca University and Human Resources Development Canada (HRDC).

Project Description

The project is investigating the learning that takes place within labour organizations. The intention is to recognize the non-formal and informal learning associated with activity in labour unions and relate that to credits within the formal educational system, in particular to labour studies and labour relations courses in colleges and universities.

Labour education spans a range of "tools", issues and "labour studies" courses (Spencer, 1994; 1998a) which have few linkages to college and university credit courses (limited exceptions include George Brown College, Capilano College and Athabasca University). Put simply labour education programs (and the learning of the union members) are not generally recognized by the formal educational system.

In addition to labour education for activists and representatives labour offers a range of other workplace-based courses for members, ranging across basic education and language training, health and safety and vocational issues which may also be investigated.

A further area of inquiry will be the informal learning associated with union activity such as knowledge about: running meetings, advocacy, representation, leadership and democratic processes and the insights gained into understanding such concepts as "incorporation" and "independence,, as the apply to labour relations.

The intention is to achieve a very practical outcome: a schema suggesting a method of linking "learning labour" to college and university credits. This would act as an encouragement to working people to engage in credit courses which may benefit themselves and their organizations. It would grant credit -- a form of advanced standing — which acknowledges what they have learned from their experience and from their labour education is valuable, important knowledge recognized as such by the academy.

The project relies on co-operation from individual unions and labour centrals. Unions such as CEP, Steelworkers, CAW, CUPE, PSAC, and AUPE, and labour centrals at provincial (e.g. OFL, ALF) and national level (e.g. CLC) can be expected to co-operate (the Ontario region of CEP was the first to endorse this proposal). The project could also be linked to the work of the Labour College of Canada and the new CLC training initiative (AU has some links with all of these labour organizations). Data is being collected from all participating unions; data relating to the range, nature and duration of labour education courses and programs and to informal learning within those organizations.

Other information will be gathered from colleges and universities offering labour studies and labour relations courses.

Eventually a matrix or schema will be suggested for linking learning labour to credit. This schema will be discussed with all the participants.